Zendesk Chat Essentials

zendesk

An Overview of
Zendesk Chat

Set Up
Zendesk Chat

Optimize
Zendesk Chat

Measure
Zendesk Chat

An Overview of Zendesk Chat

An Overview of Zendesk Chat

Walk through the Chat Lifecycle

An Overview of Zendesk Chat

An Overview of Zendesk Chat

Zendesk family of products

support

guide

chat

talk

explore

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Zendesk family of products

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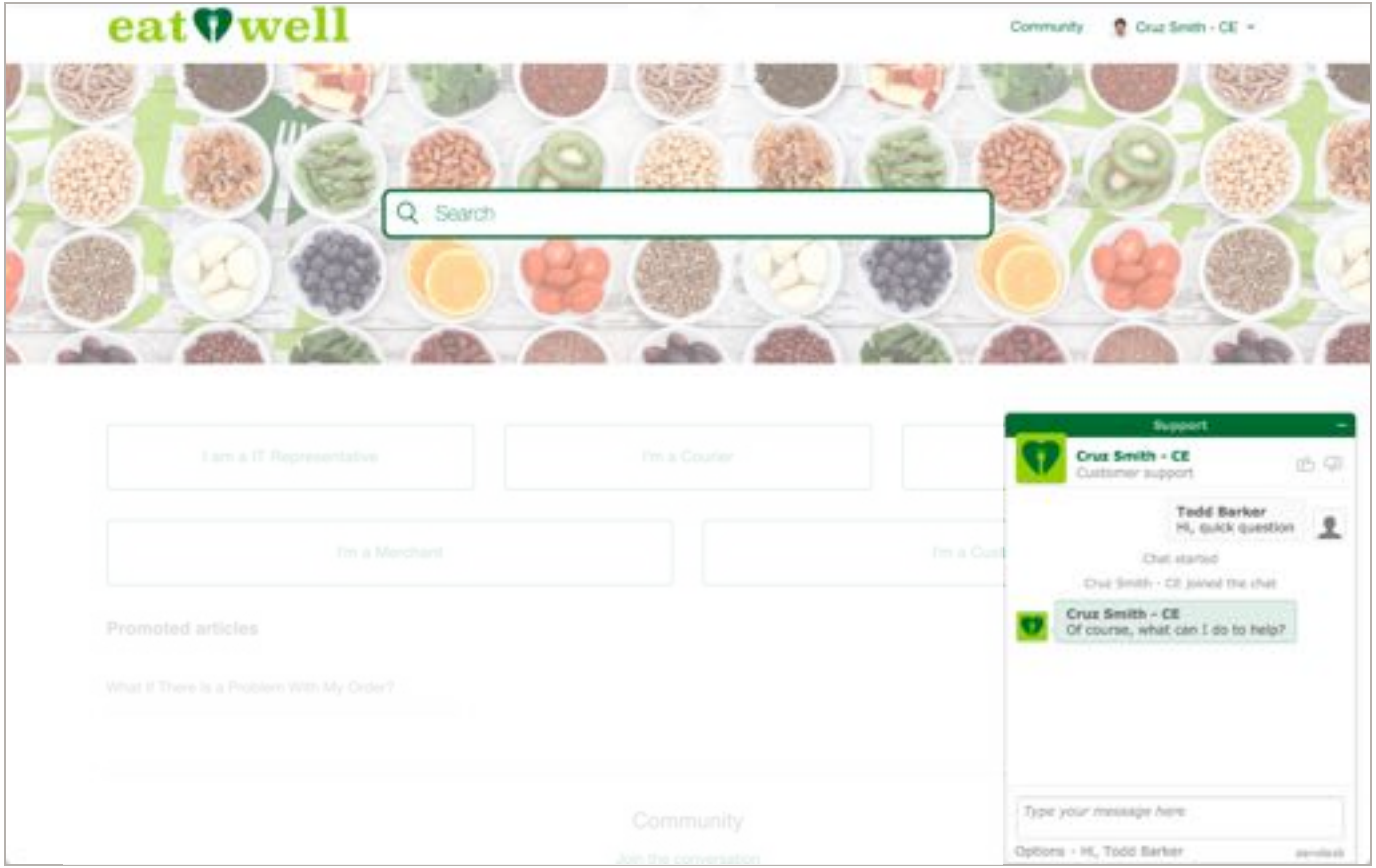
chat

talk

explore

An Overview of Zendesk Chat

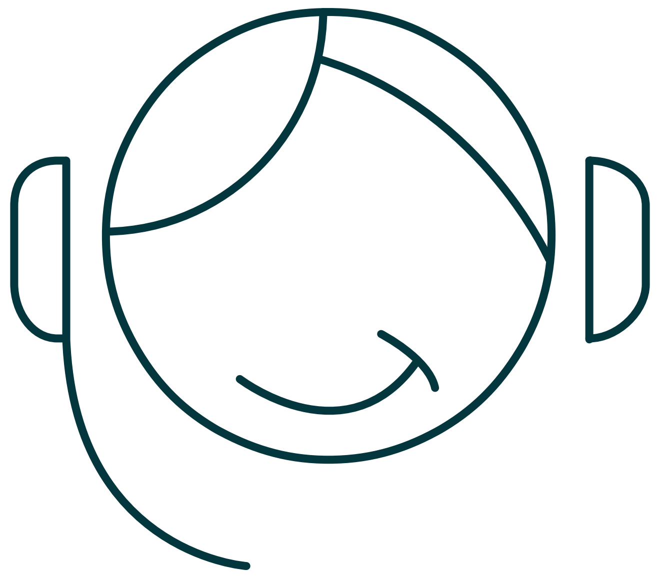
The Chat experience



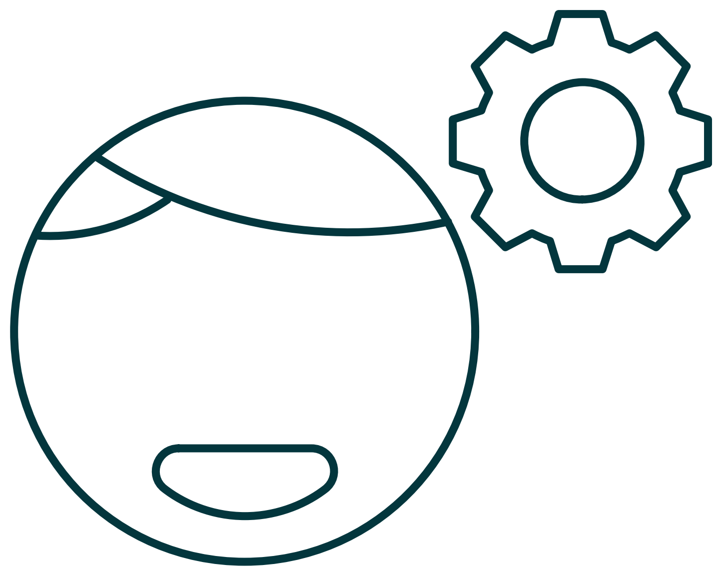
An Overview of Zendesk Chat

User roles

Website Visitors
chat with agents while visiting their website.



Chat Agents *
chat with visitors to resolve requests.



Chat Administrators
manage how Zendesk Chat settings and features are set up.

* Chat agents can be Chat-only or use both Support and Chat

An Overview of Zendesk Chat

The Chat dashboard for admins

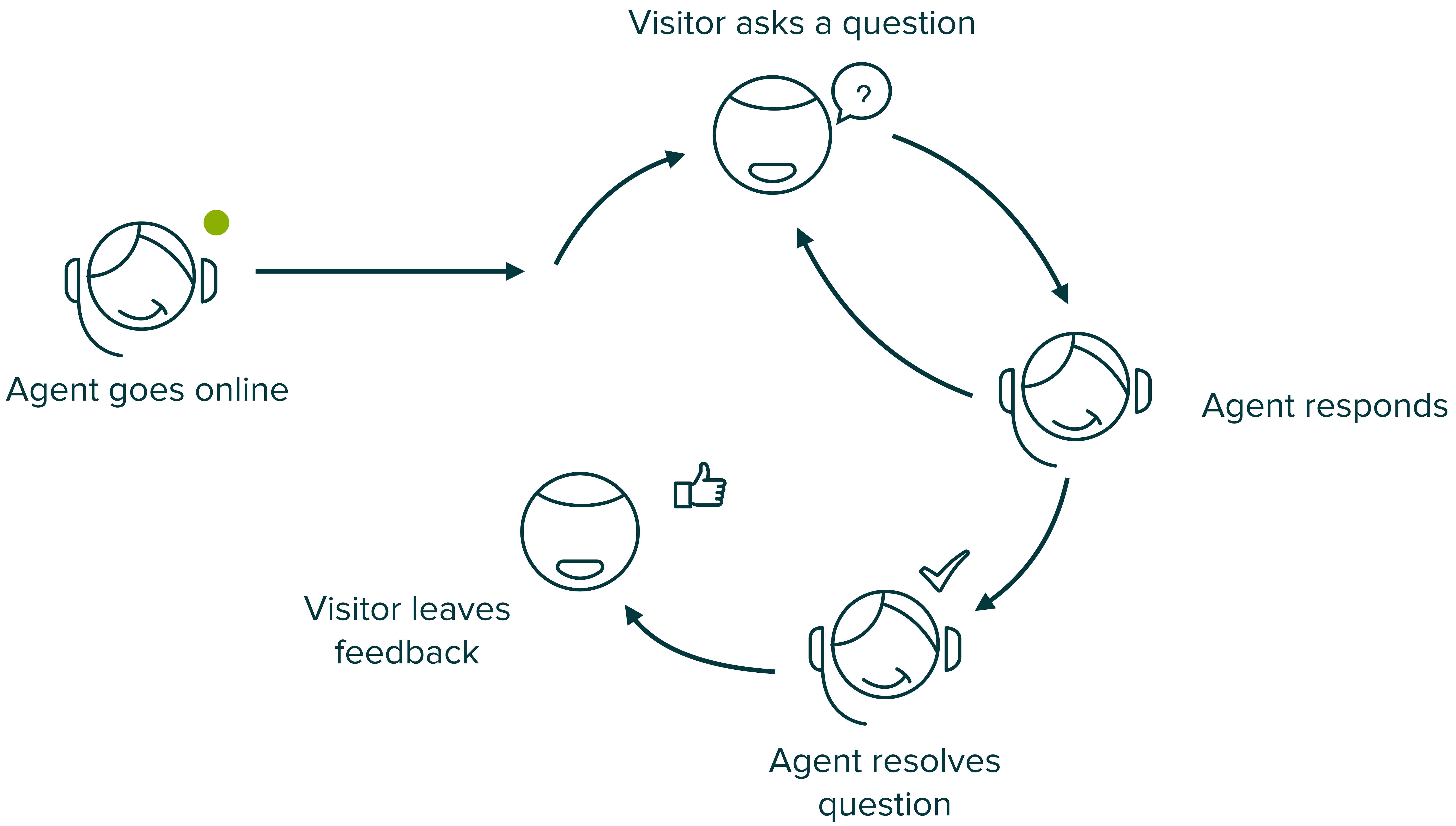
Chat Settings

Analytics

Walk Through the Chat Lifecycle

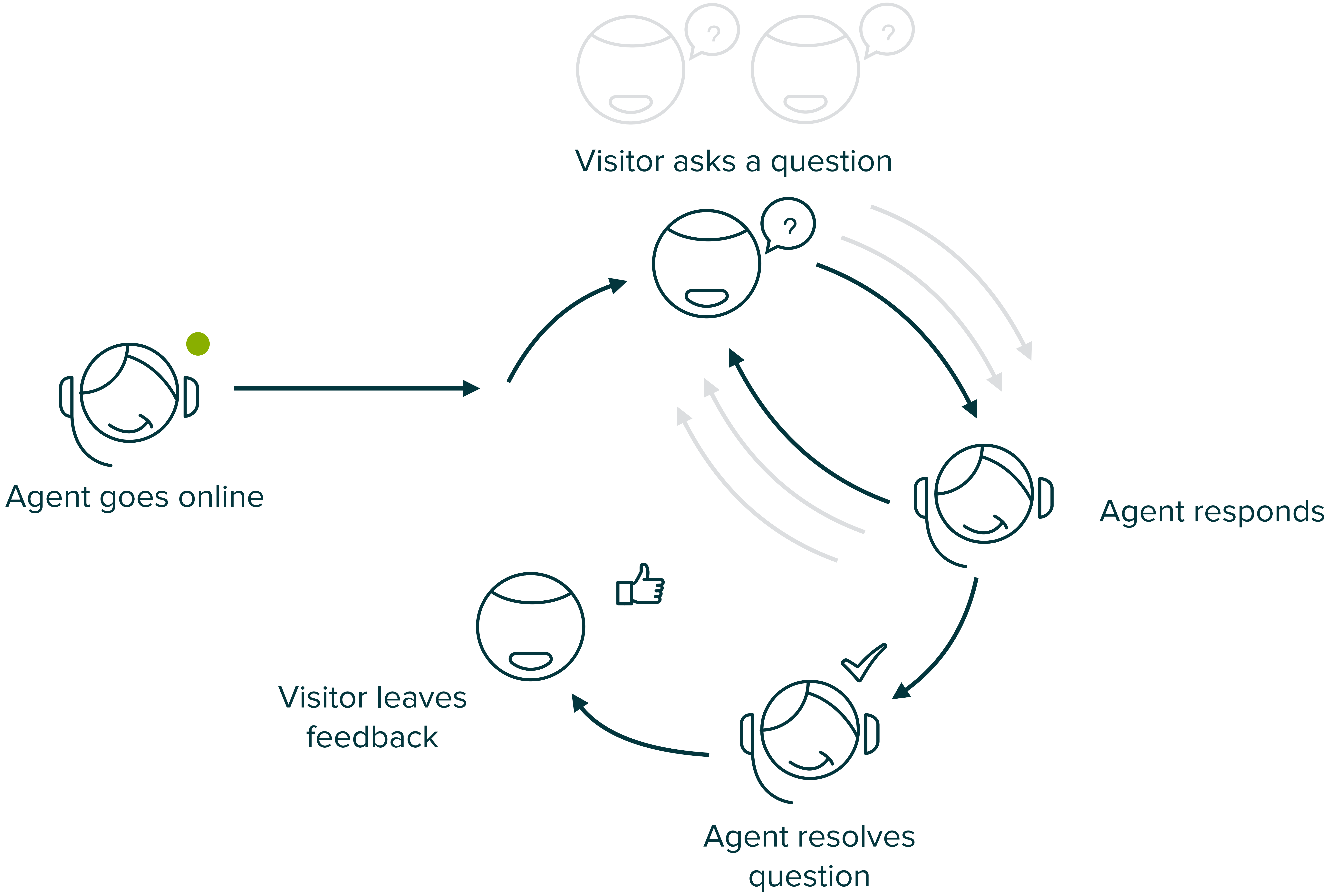
Walk Through the Chat Lifecycle

Chat timeline



Walk Through the Chat Lifecycle

Chat timeline



Walk Through the Chat Lifecycle

Overview of the Chat dashboard for agents

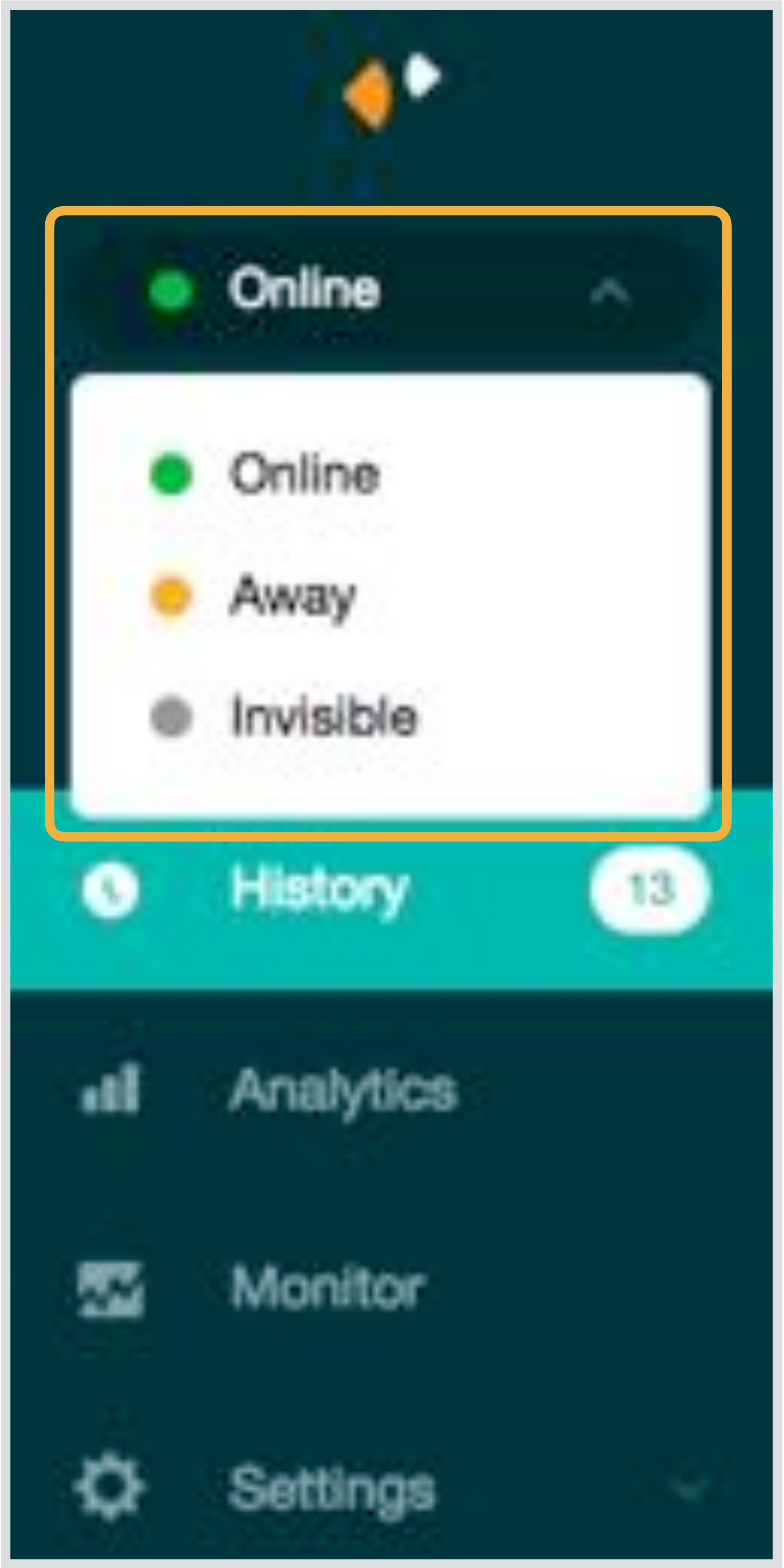
Agent Status

Agent Profile

Incoming Request

Walk Through the Chat Lifecycle

Chat status



Online shows customers and other agents you’re available.

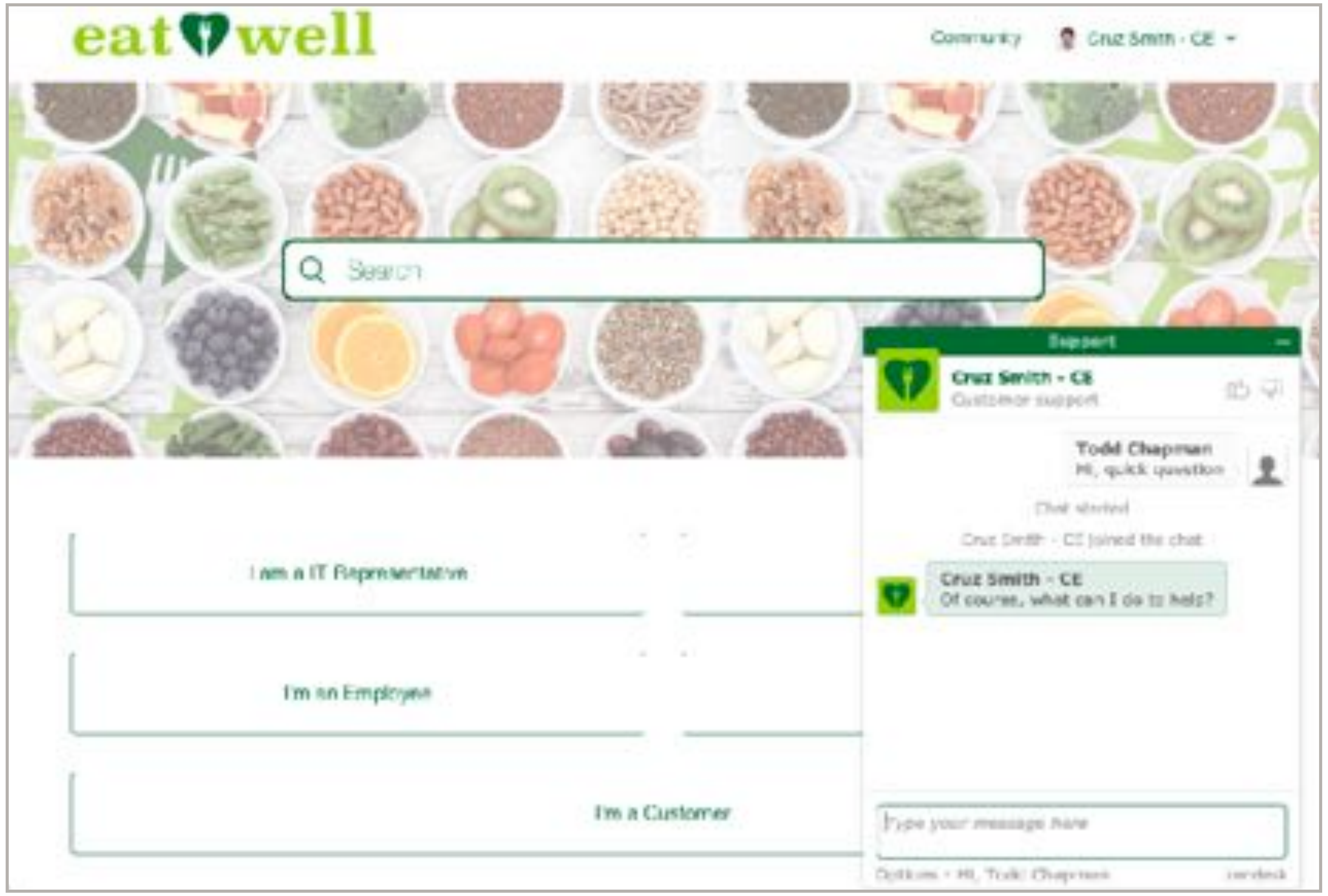
Away shows other agents you’re away, and chats will not be routed to you.

Invisible allows you to log into the dashboard but not be seen as online.

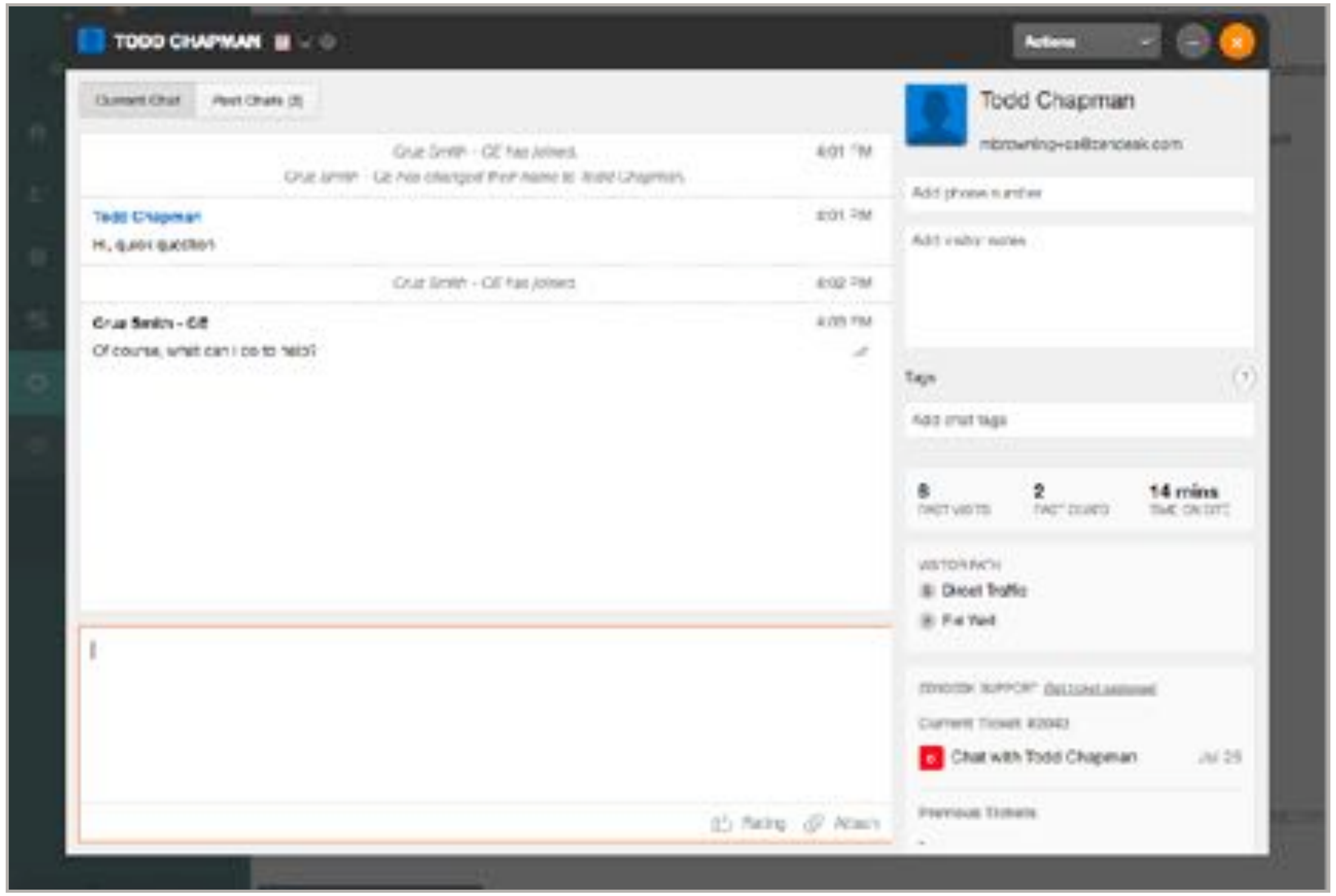
When all agents are invisible or away, the chat widget does not appear.

Walk Through the Chat Lifecycle

The Chat experience



Visitor's Experience



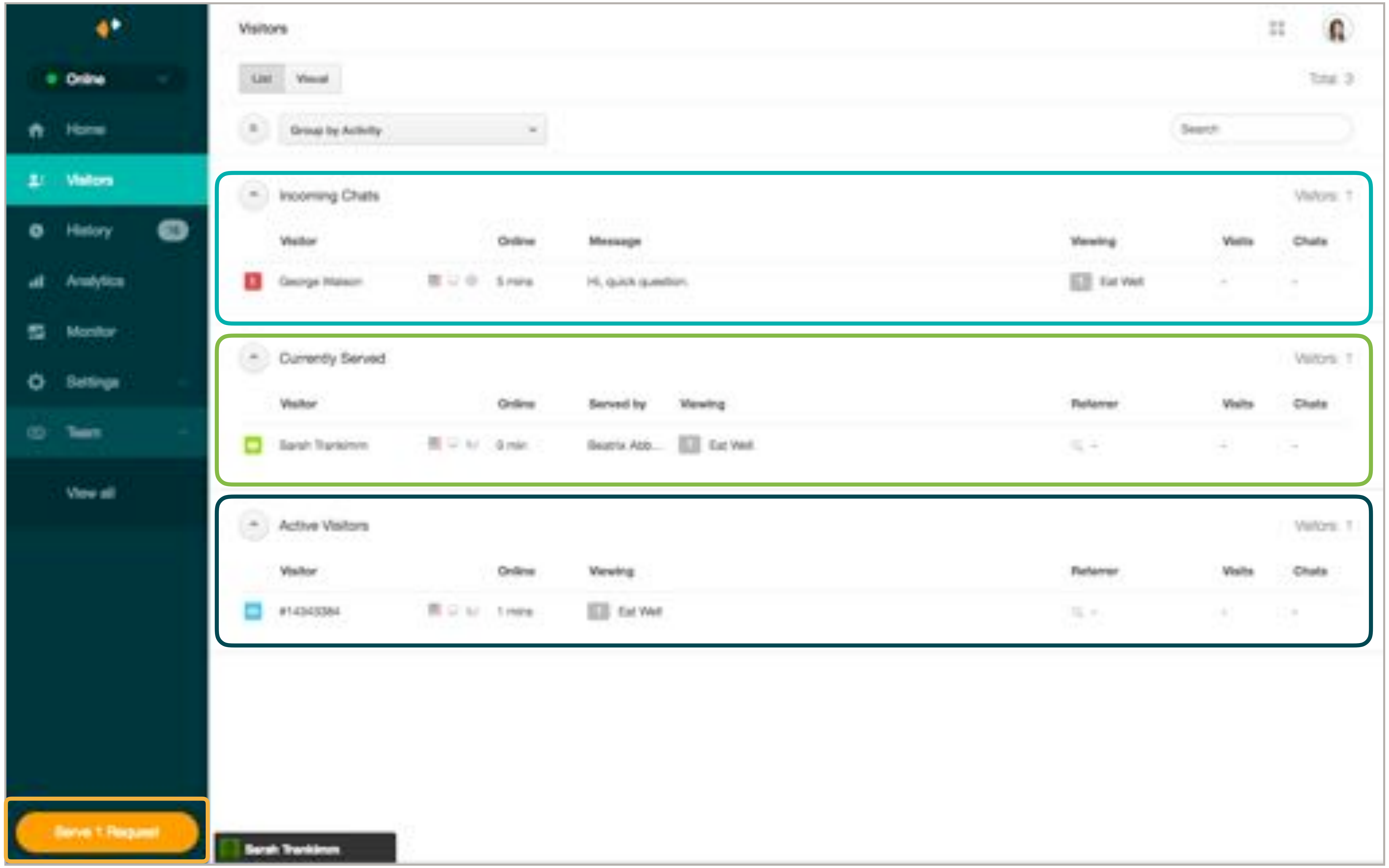
Agent's Experience

Demo

Walk through the Chat lifecycle

Walk Through the Chat Lifecycle

Visitors list



Incoming Chats

Currently Served

Active Visitors

Incoming Request

Demo

Use the visitor list to proactively chat

Pop Quiz

Looking at this visitor list, how long has Beatrix been online?

An Overview of Zendesk Chat

An Overview of Zendesk Chat

Walk through the Chat Lifecycle

An Overview of Zendesk Chat

Set Up Zendesk Chat

Optimize Zendesk Chat

Measure Zendesk Chat

Set Up Zendesk Chat

Add Agents

Add Roles and Permissions

Set Up and Configure Your Web Widget

Add Operating Hours

Configure Support Ticket Creation

Add Agents

Demo

Add an agent to Chat

Add Agents

Try it!

Add an agent

1. Navigate to **Settings** > **People** > **Agents**, select an existing Support agent.
2. Toggle the **Zendesk Chat** button on.
3. To make the agent Chat-only, select the **Role** menu and choose **Chat-only**.

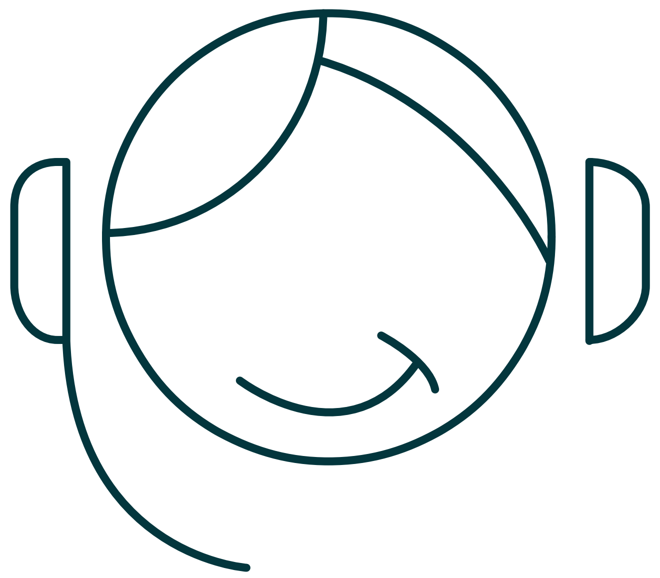
Define Custom Roles and Permissions

Define Custom Roles and Permissions

Custom roles enable you to **define agent permissions.**

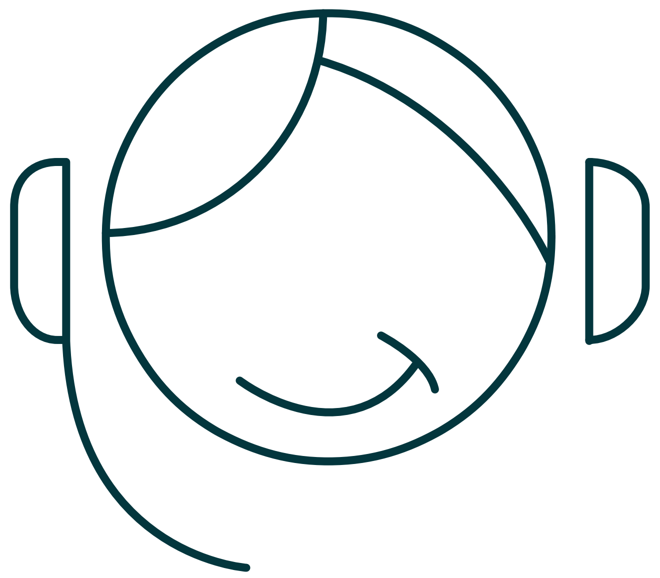
Define Custom Roles and Permissions

Setting agent roles and permissions



Agent 1

Is part of a large team and is only responsible for chatting with customers. This agent should not have access to data about their peers.



Agent 2

Leads a team and needs to run reports so they can give feedback to the agents on their team.

Define Custom Roles and Permissions

Roles and Permissions

Custom roles let you set permissions to define who can:

- See visitors
- Listen in on chats
- Access historical chats
- Ban visitors
- Access analytics
- Edit departments
- Add shortcuts

Define Custom Roles and Permissions

Create a custom role

Demo

Define custom roles and permissions

Set Up and Configure Your Web Widget

Set Up and Configure Your Web Widget

The web widget is **what your customers use to chat with agents.** Admins use it to match the website brand and combine Zendesk products.

Set Up and Configure Your Web Widget

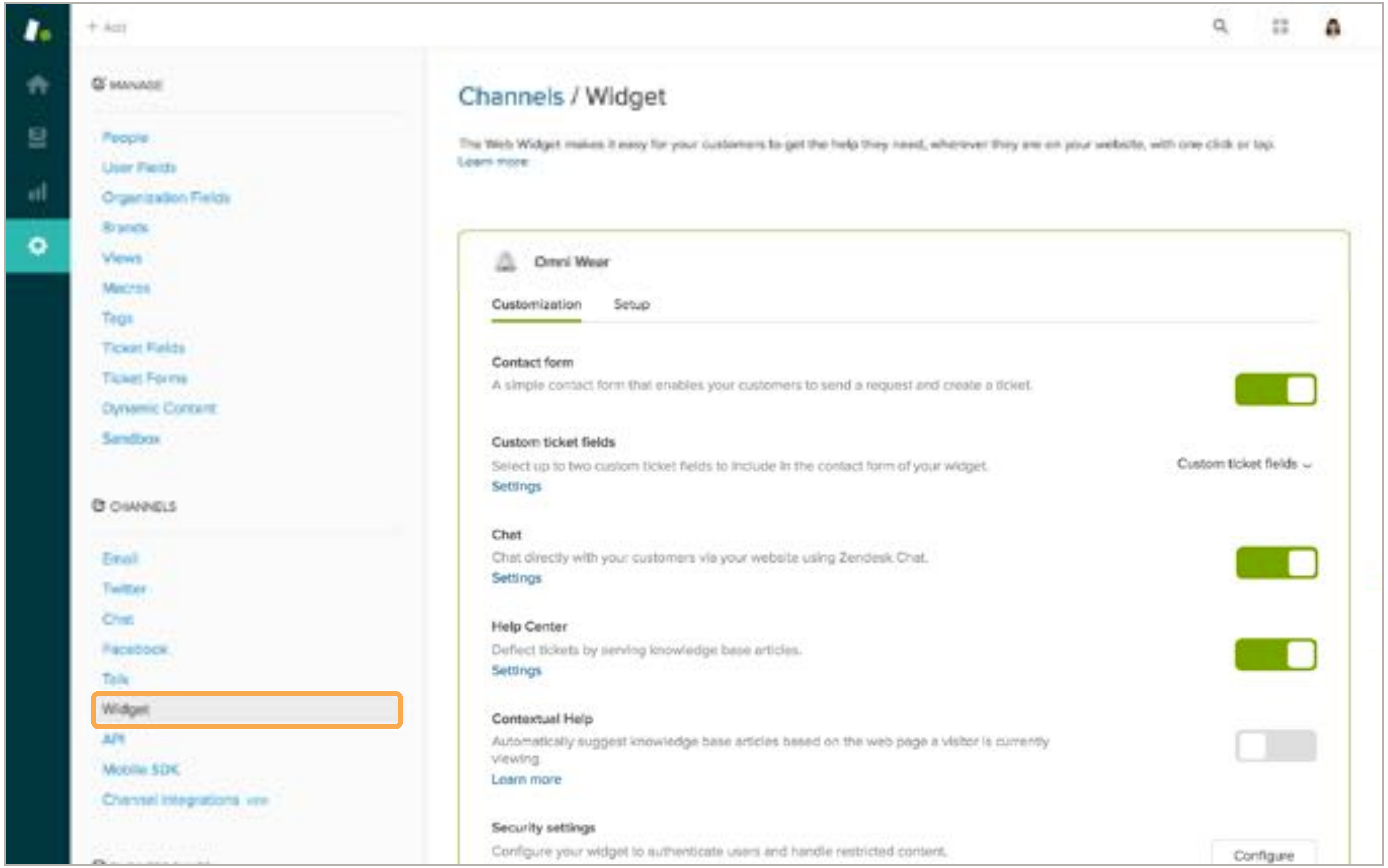
What are you trying to achieve?

Happy customers

Higher sales

Lower costs

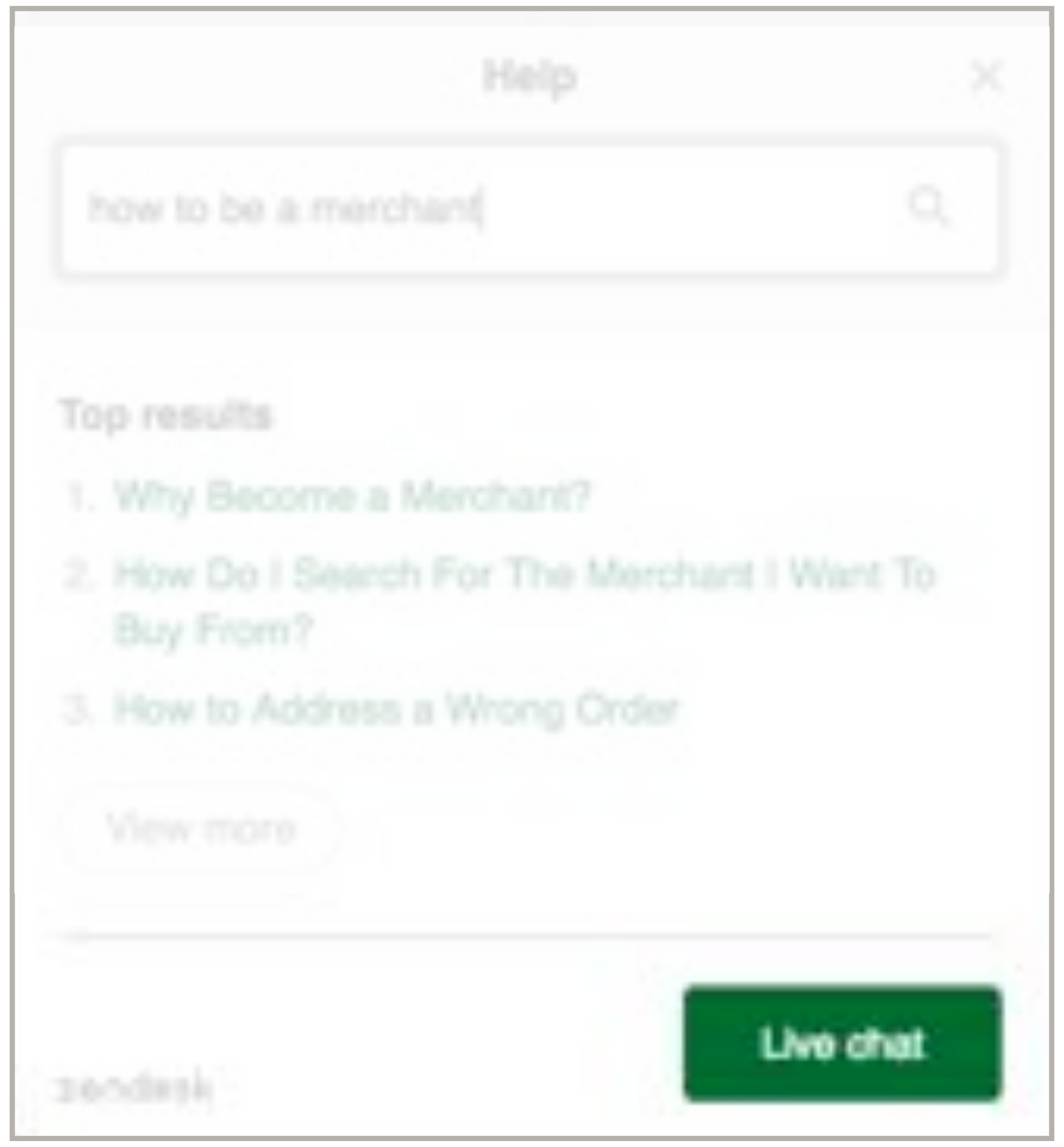
Set Up and Configure Your Web Widget



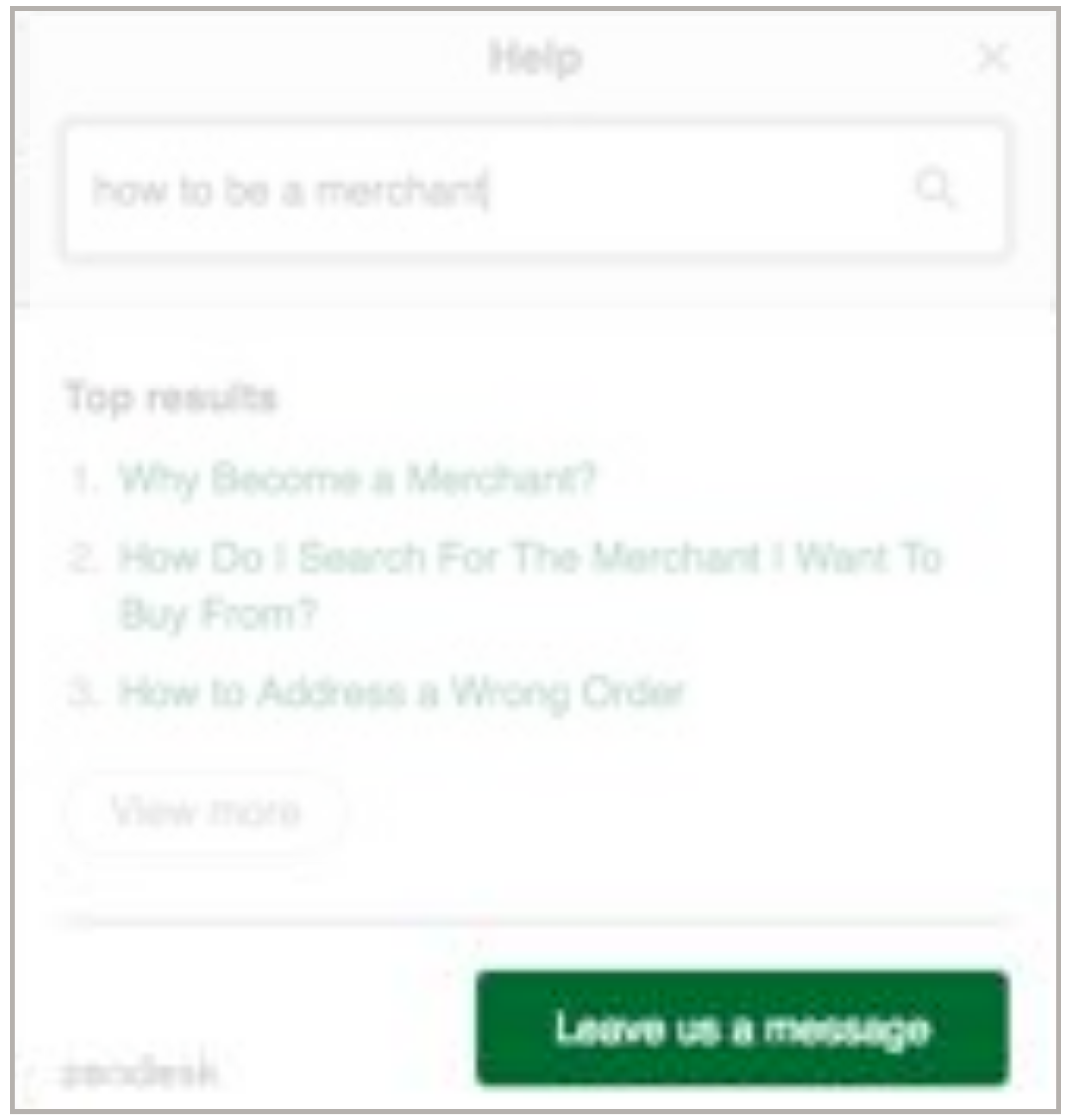
Set Up and Configure Your Web Widget

Zendesk products in the web widget

Chat is turned on,
Agents are Online



Chat is not available,
Support is enabled

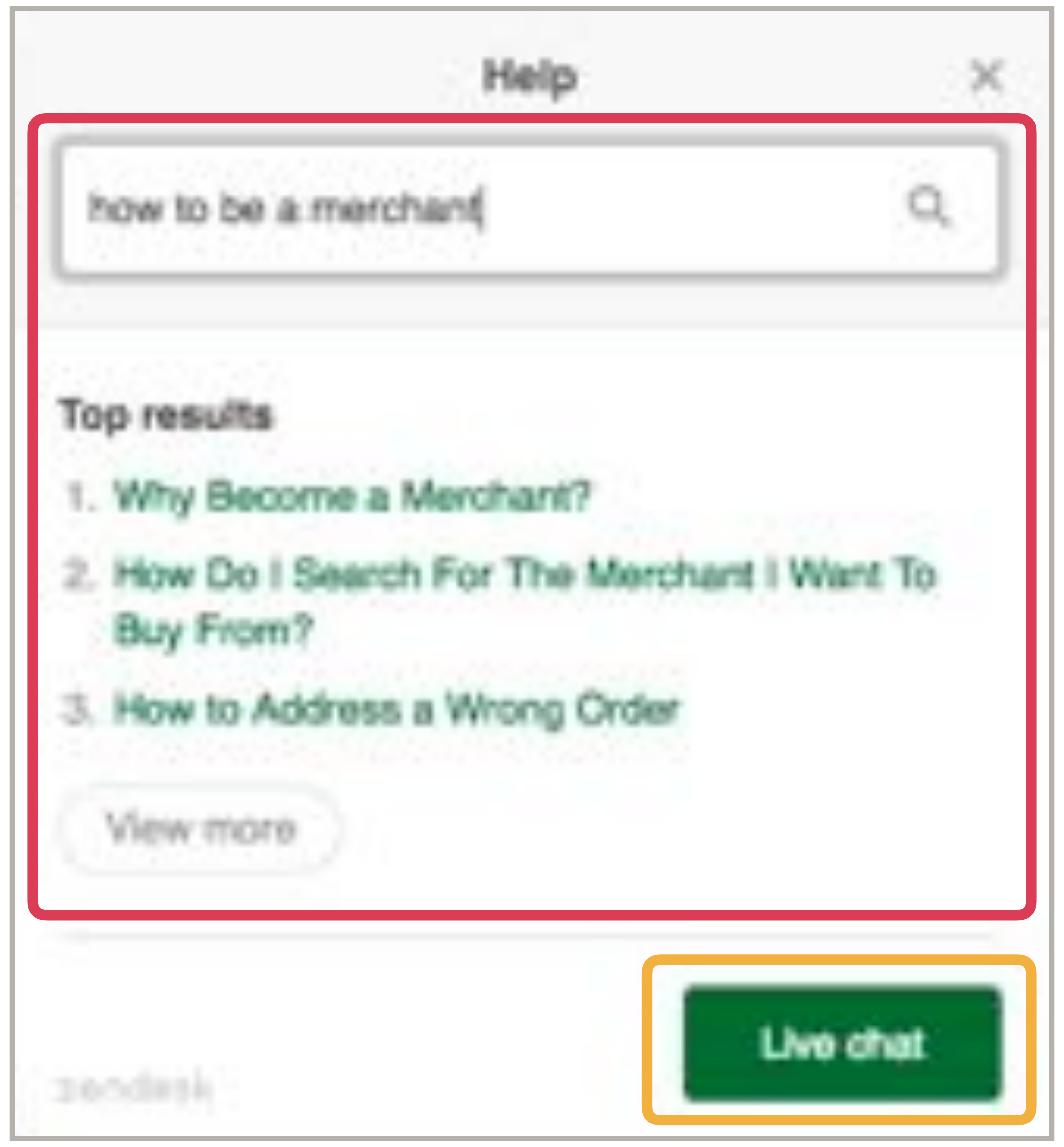


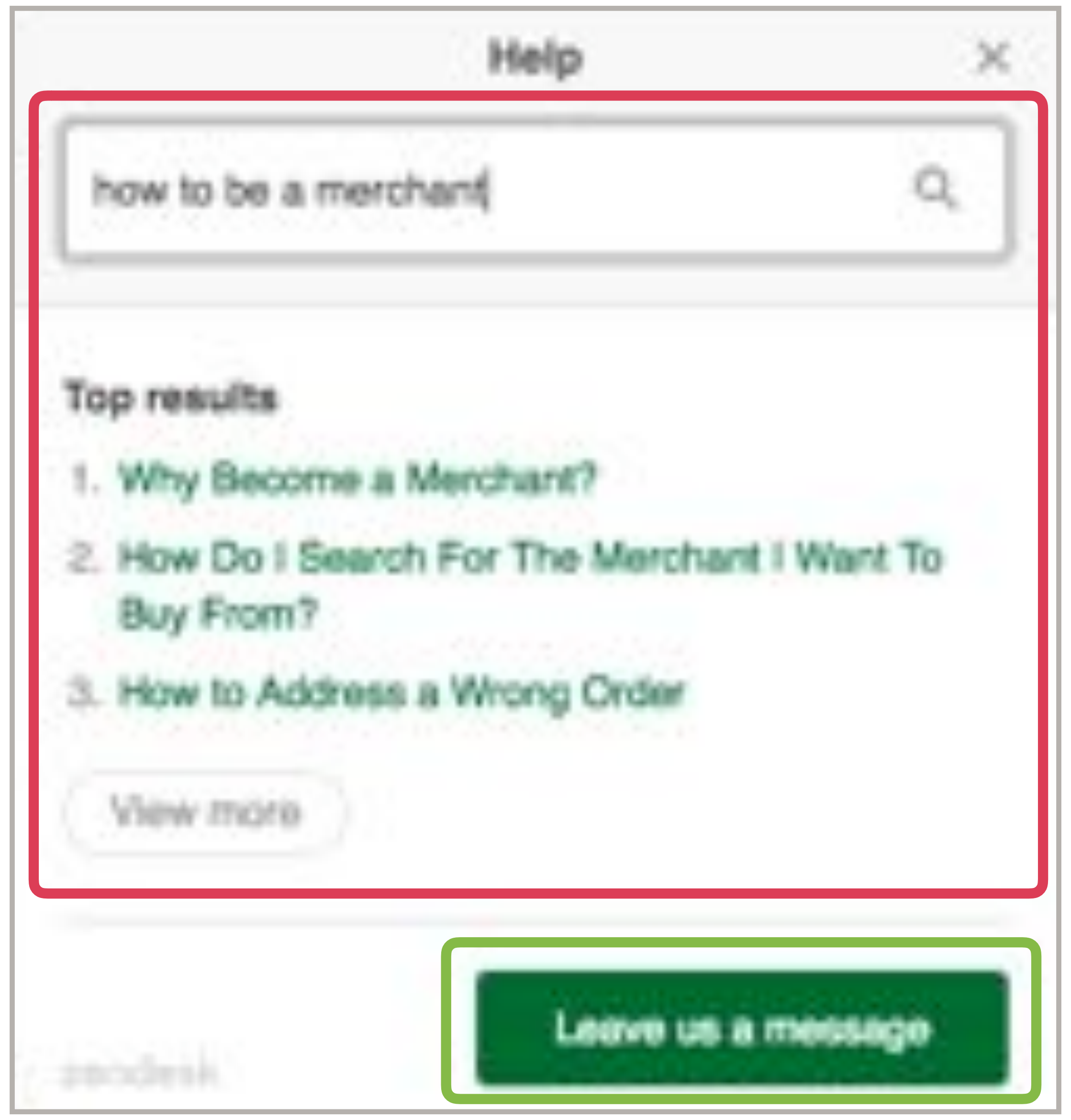
Set Up and Configure Your Web Widget

Zendesk products in the web widget

Find knowledge base articles

guide





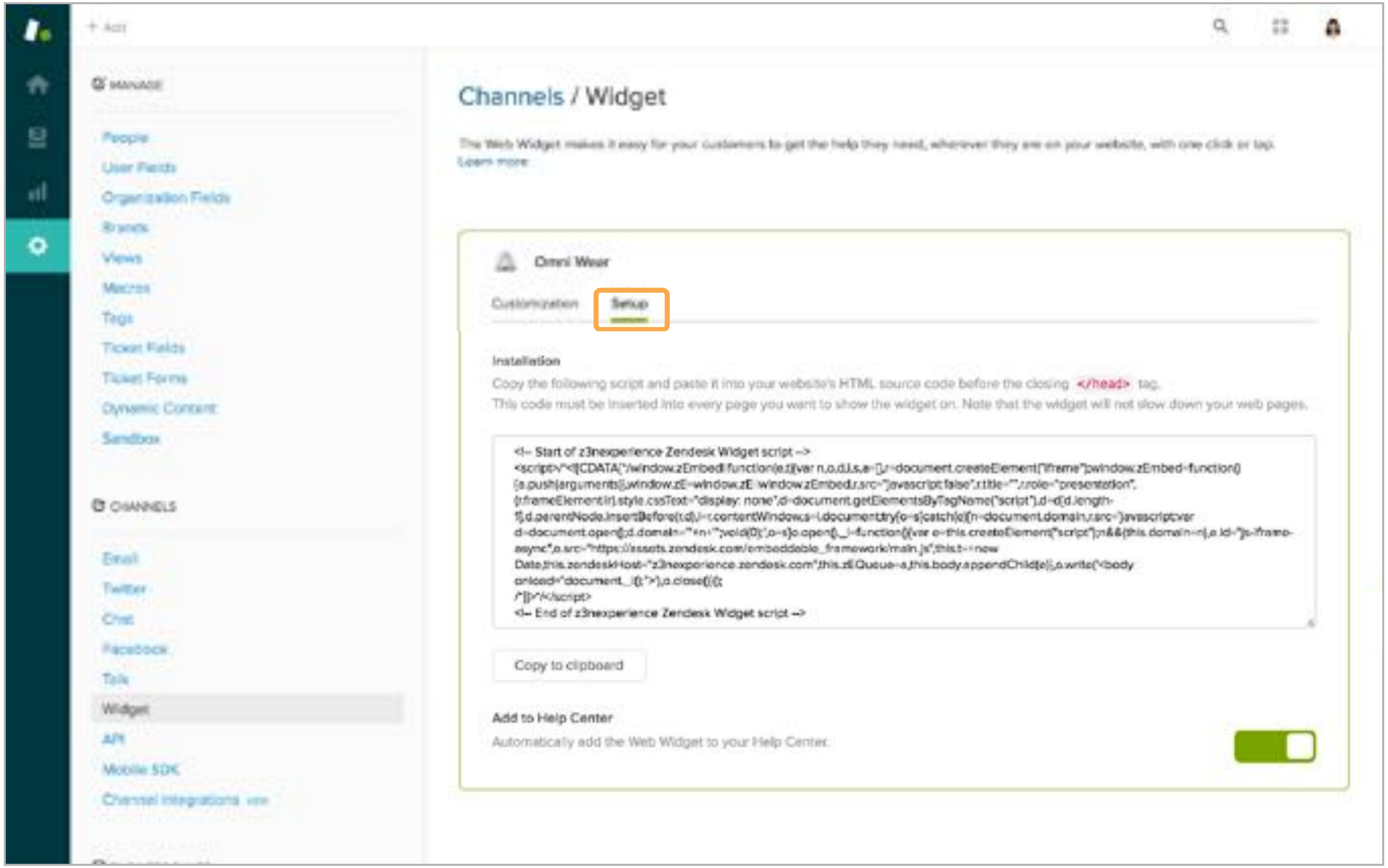
Chat with an agent

chat

Submit a Support ticket

support

Set Up and Configure Your Web Widget



Demo

Configure your Web Widget from Support

Try it!

Setup and configure your Web Widget

1. Go to **Admin** > **Channels** > **Widget**, then click on the Customization tab.
2. Click the toggle On for the Contact form, Chat and Help Center components.
3. Select your Theme color and the position of the Widget.
4. Set the text for the Widget button and the Contact form button.
5. Click **Save**.
6. If you have Guide enabled, switch to the Setup tab, then click the toggle **Add to Help Center** on.

Demo

Configure Web Widget settings within Chat

Set Up and Configure Your Web Widget

Web widget best practices

Start small

Chat volume is unpredictable at first. Try placing the widget on a few key pages first rather than every page so that your agents can become comfortable chatting with customers.

Align your goals

Where you place the widget should align with your goals. To increase sales, place it on the checkout page. To increase CSAT place it directly in your product.

Deflect chats

Using Guide with Chat in the web widget will cut down on the number of chats your agents handle, as customers answer their own questions.

Set Up and Configure Your Web Widget

Pop quiz

How many channels can you enable in the Widget?

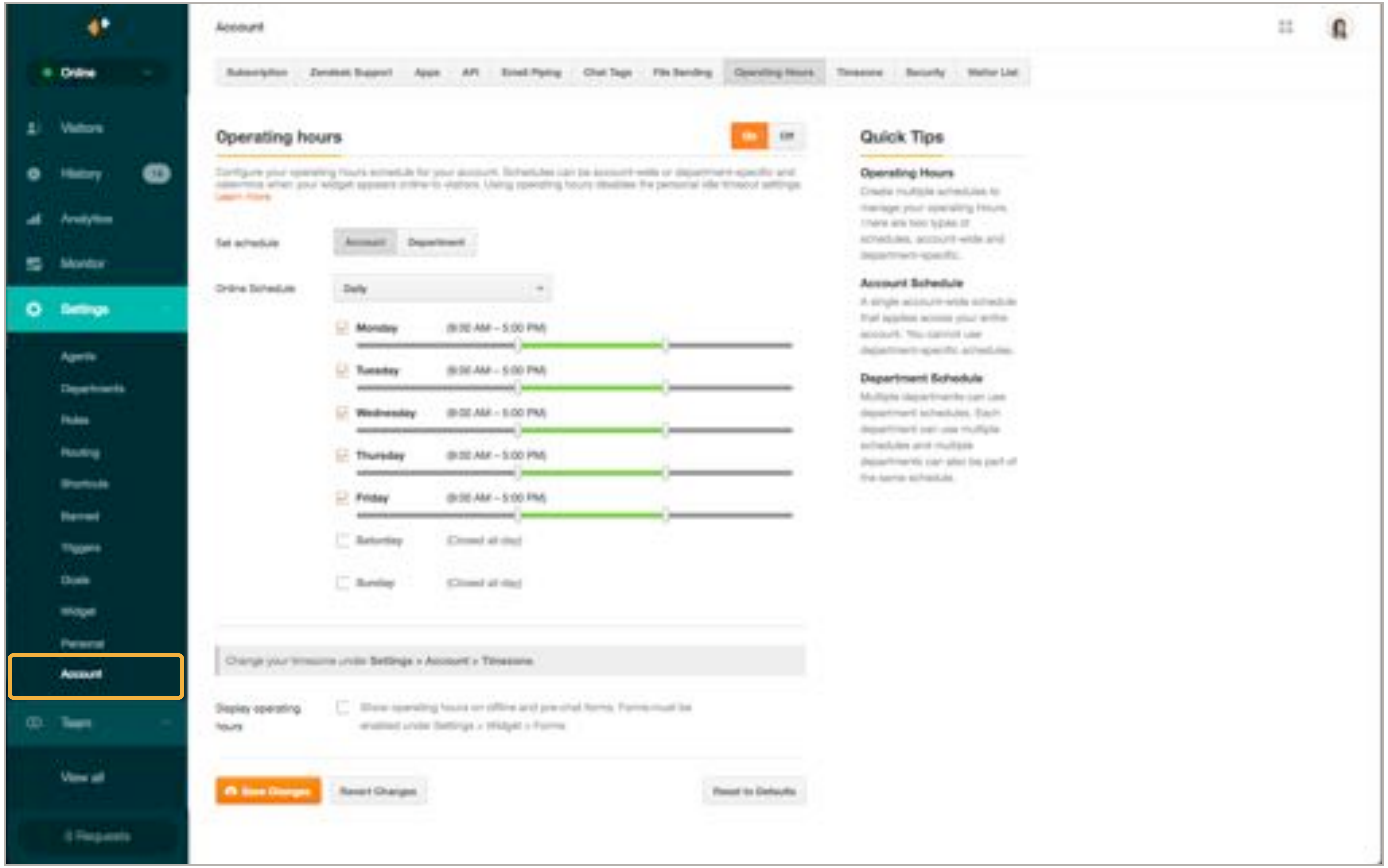
Add Operating Hours

Add Operating Hours

Operating hours allow admins to set a daily or weekly **schedule for when agents appear online.**

Add Operating Hours

Change operating hours



Demo

Add operating hours

Add Operating Hours

Try it!

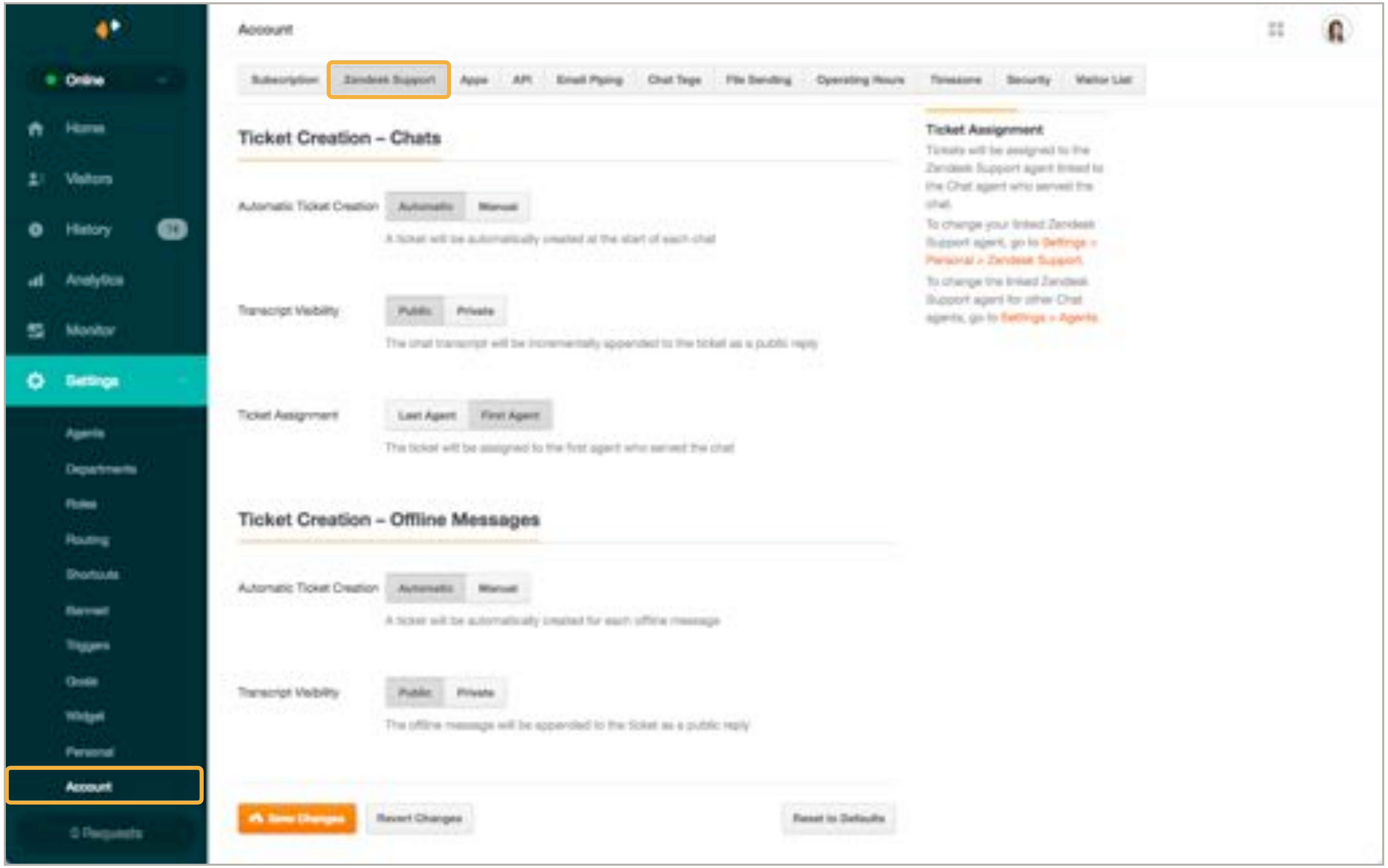
Edit operating hours

1. Navigate to Settings > Account and choose Operating Hours at the top of the screen.
2. Turn Operating Hours On and add Account Operating Hours so agents are available M-F from 7am to 7pm.
3. Save Changes.

Configure Support Ticket Creation

Configure Support Ticket Creation

Configure Support ticket creation



Set Up Zendesk Chat

Add Agents

Add Roles and Permissions

Set Up and Configure Your Web Widget

Add Operating Hours

Configure Support Ticket Creation


An Overview of Zendesk Chat
Set Up Zendesk Chat
Optimize Zendesk Chat
Measure Zendesk Chat

Optimize Zendesk Chat

Utilize Shortcuts

Set Up a Trigger

Add Agents to a Department

Route a Chat to an Agent with Skills Routing

Optimize Zendesk Chat

Tools for managing incoming chats

Built by agents OR admins

Shortcuts

Built by admins, powered by **triggers**

Proactive Chat

Departments

Skills routing

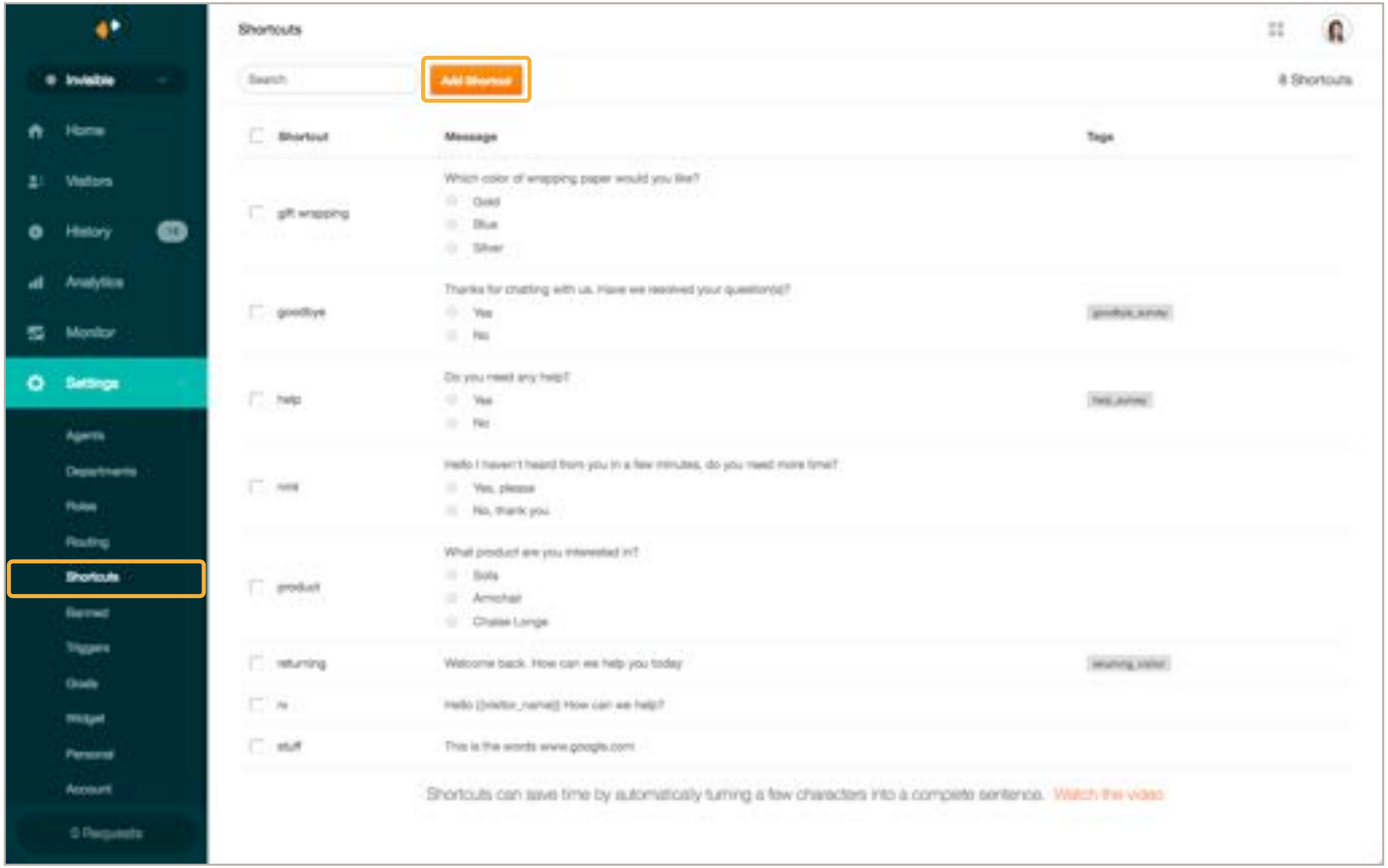
Utilize Shortcuts

Utilize Shortcuts

Shortcuts allow agents to add
pre-written responses to chats in seconds.

Utilize Apps and Shortcuts

Adding a shortcut



Demo

Set Up a shortcut

Try it!

Set up a shortcut

1. Navigate to **Settings** > **Shortcuts**, select **Add Shortcut**.
2. Think of a common question your agents might get.
3. Name your Shortcut (something easy to recall) and add a Message.

Set Up a Trigger

Set Up a Trigger

Triggers **automatically perform actions** when certain conditions are met.

Set Up a Trigger

Examples of triggers used for proactive chat

If

A visitor has been on your welcome page for 30 seconds and is idle …

Then

send them a proactive message asking if they need help to keep them engaged.

Set Up a Trigger

Examples of triggers used for proactive chat

If

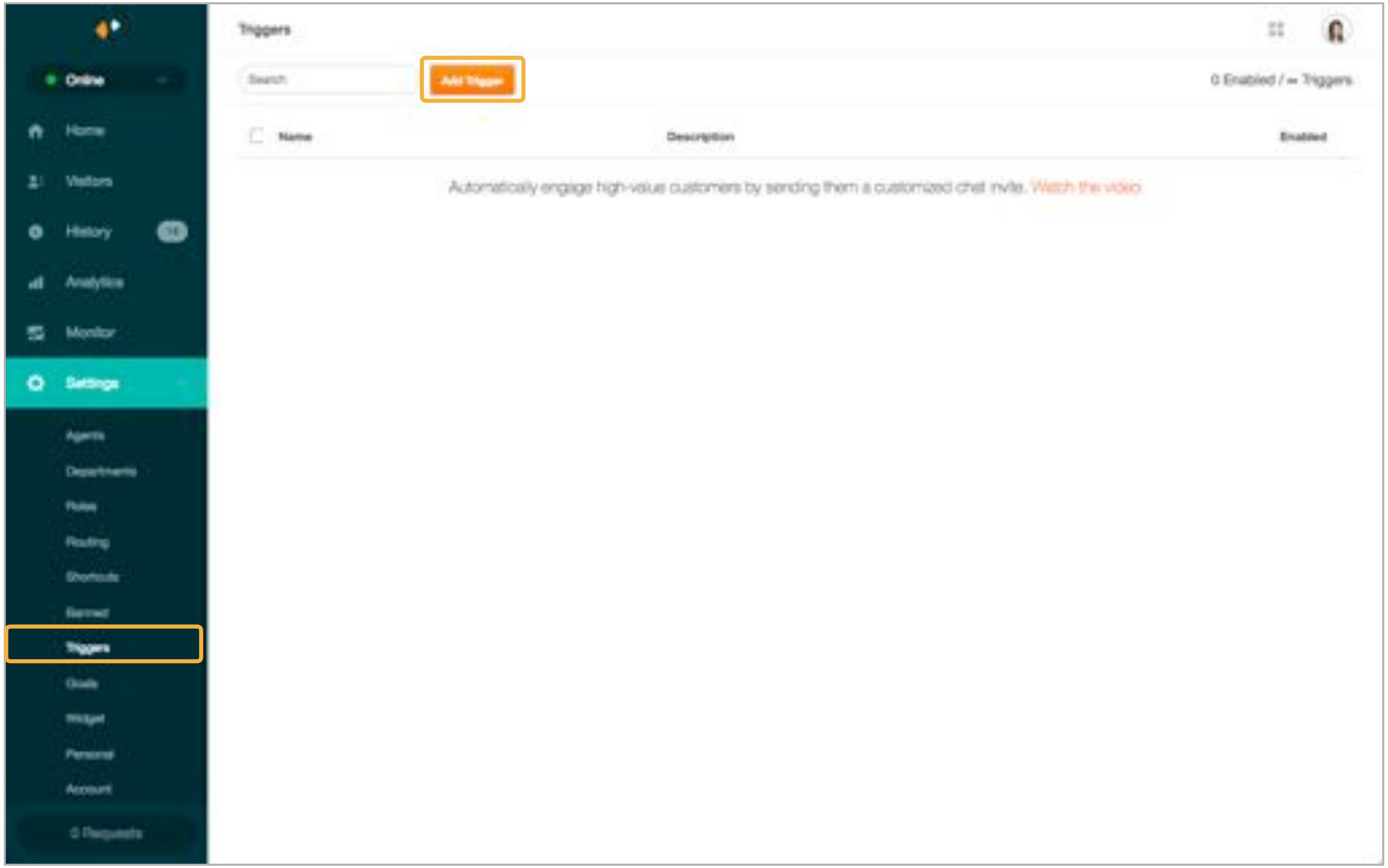
A visitor is returning to your site for a second or third time ...

Then

reach out and say hello with a personalized greeting including their name to make them feel valued.

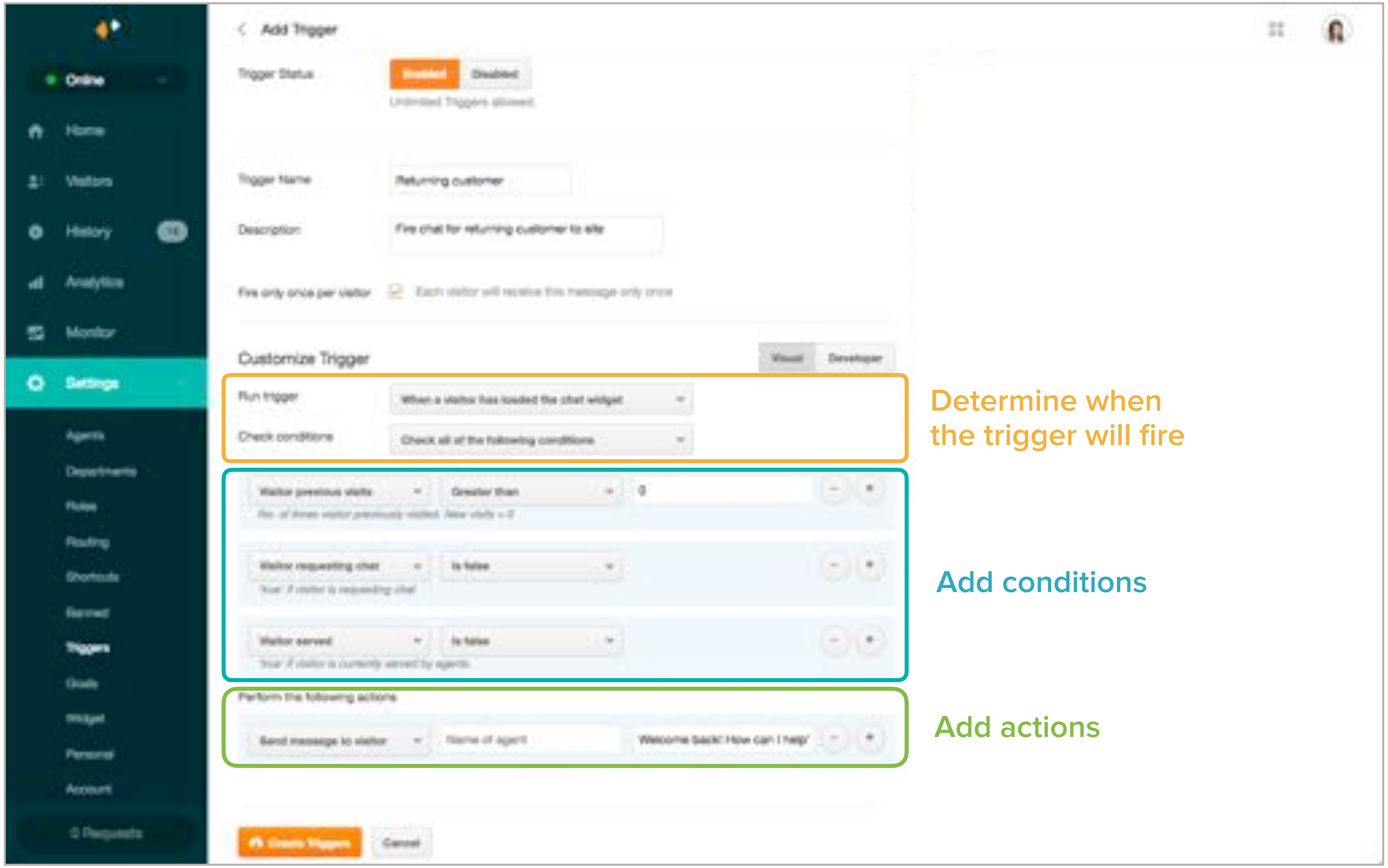
Manage Incoming Chats

Add a trigger



Manage Incoming Chats

Set up a trigger



Determine when the trigger will fire

Add conditions

Add actions

Demo

Set up a trigger

Try it!

Set up a trigger

1. Navigate to **Settings** > **Triggers**, select **Add Trigger**.

2. Think of a trigger that will benefit your workflow and build it.

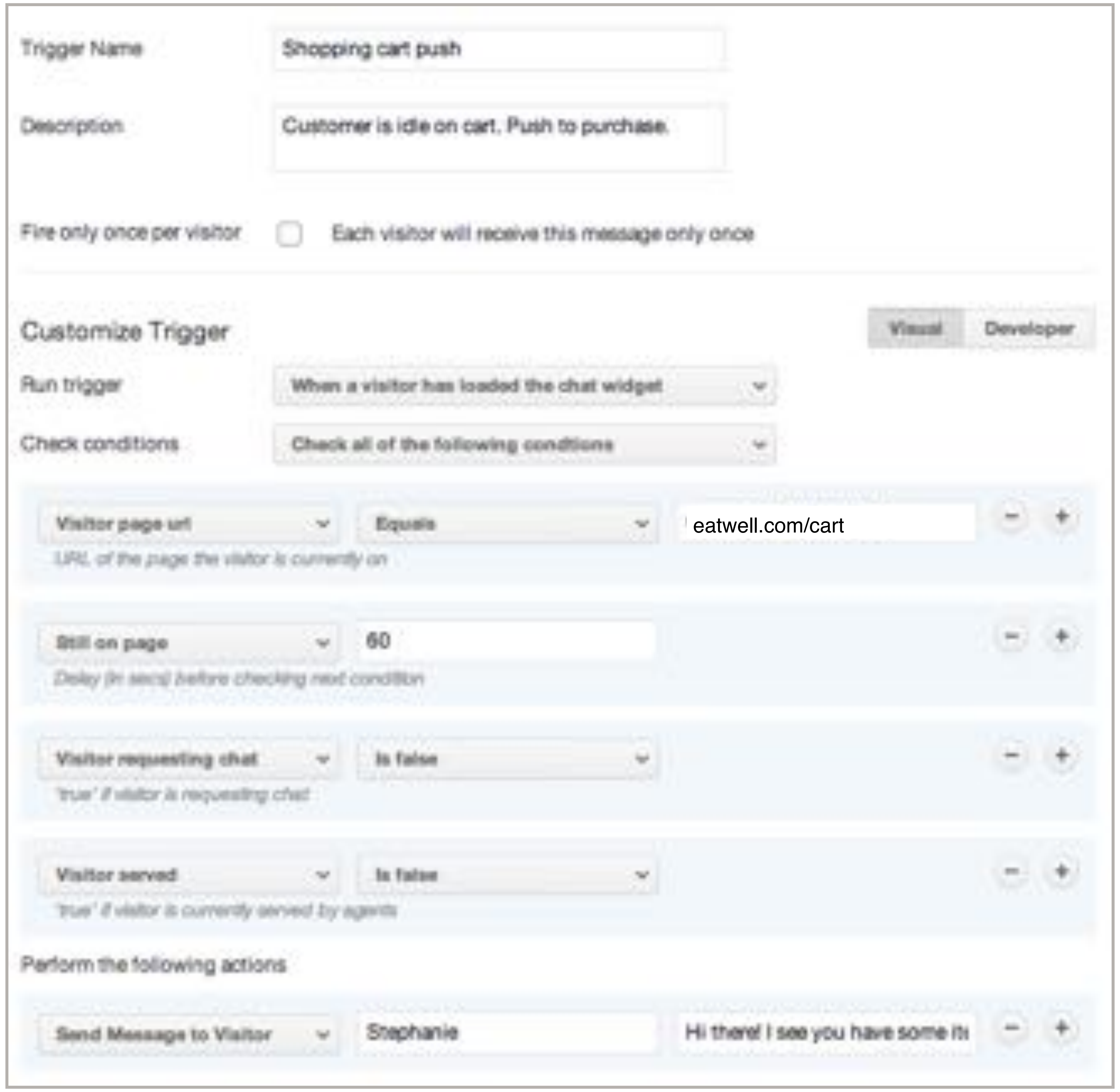
   OR

   Set up a trigger that will proactively greet a visitor who has previously visited the site.

   - **Condition**: **visitor previous visits** > **Greater than** > **0**
   - **Action**: **Send message to visitor** > **Name of Agent** > **add a message**

Pop Quiz

What does this trigger do?

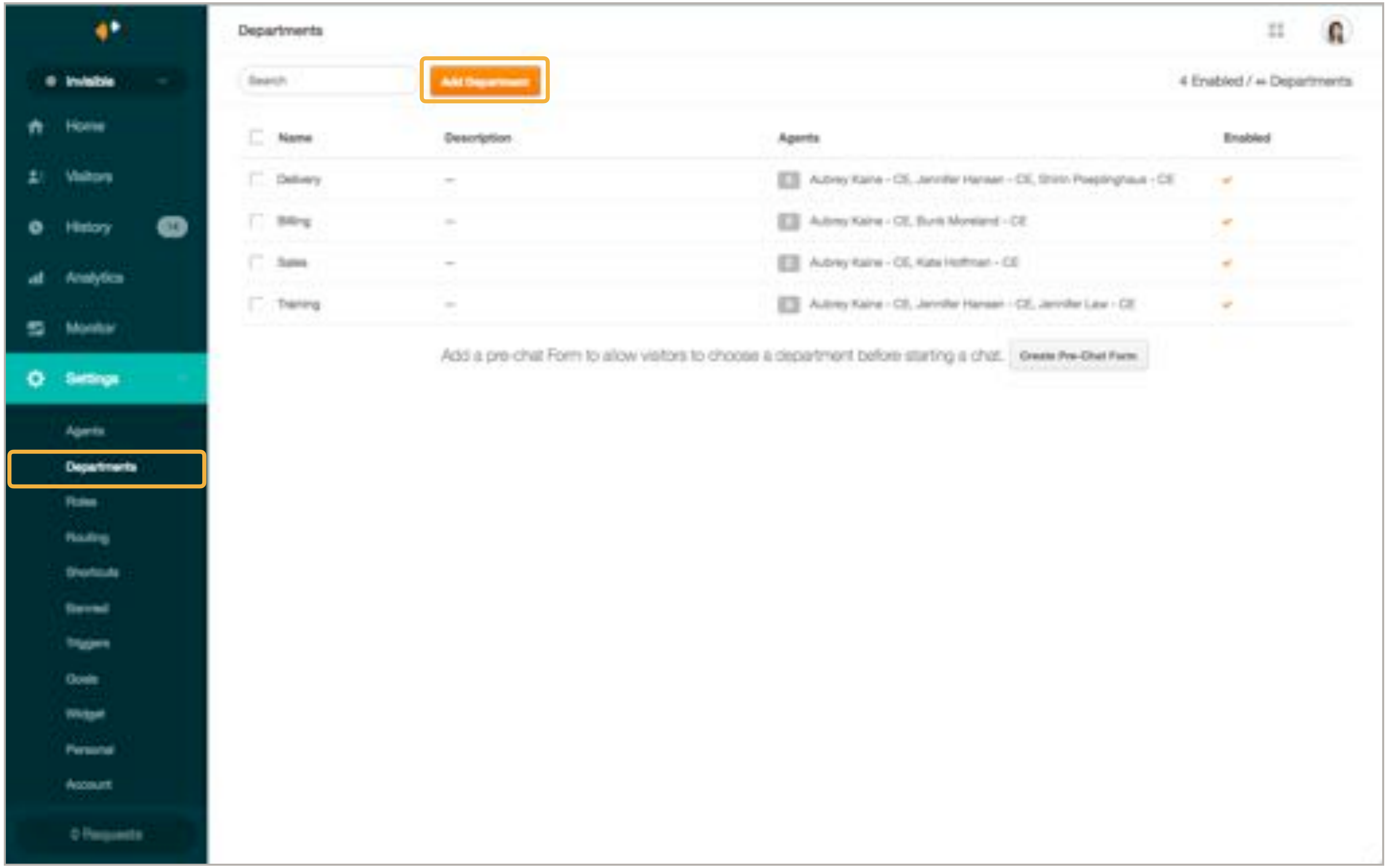


Add Agents to a Department

Use departments to **filter chat requests** to a specific group of agents.

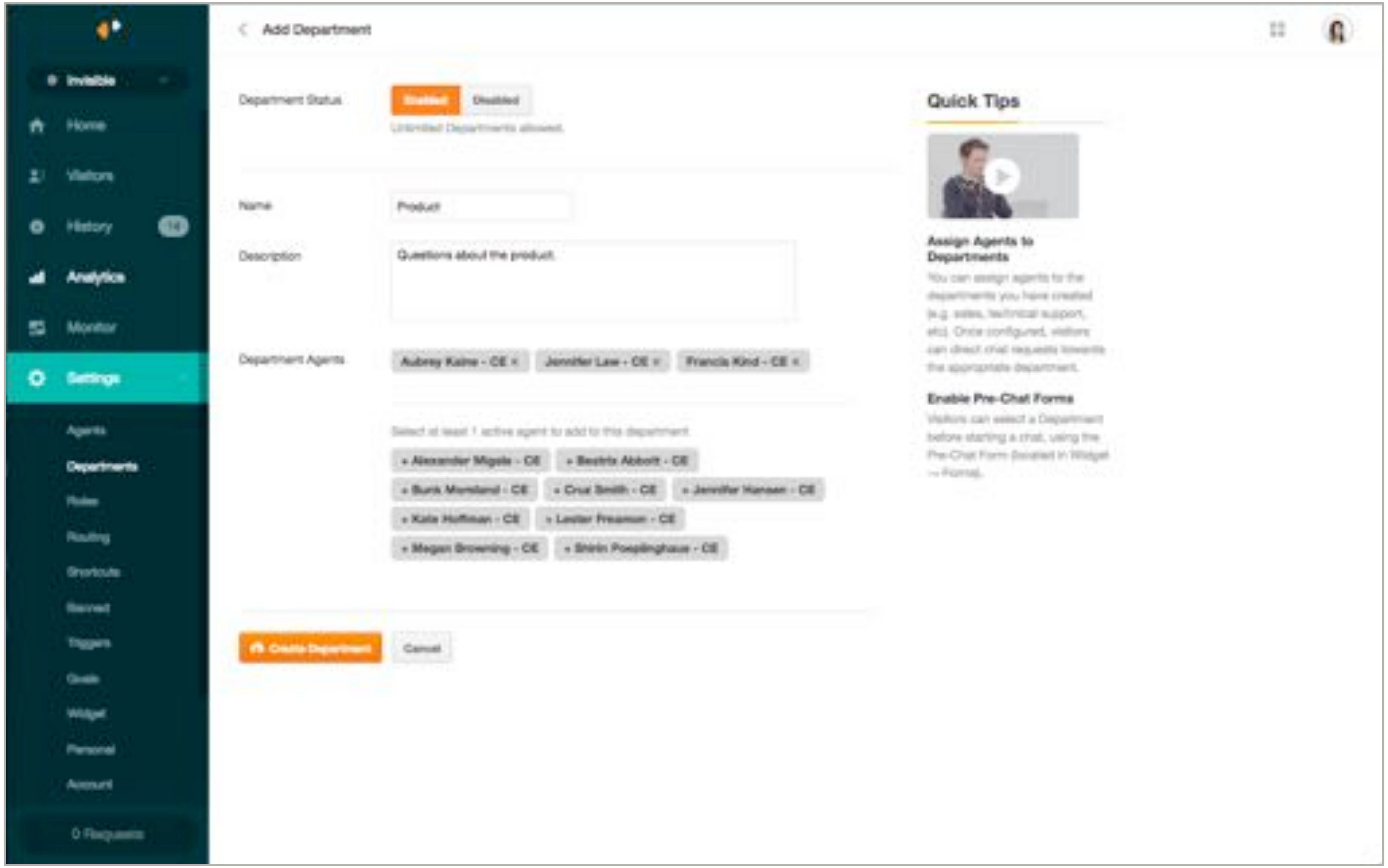
Manage Incoming Chats

Add agents to a department



Manage Incoming Chats

Add agents to a department

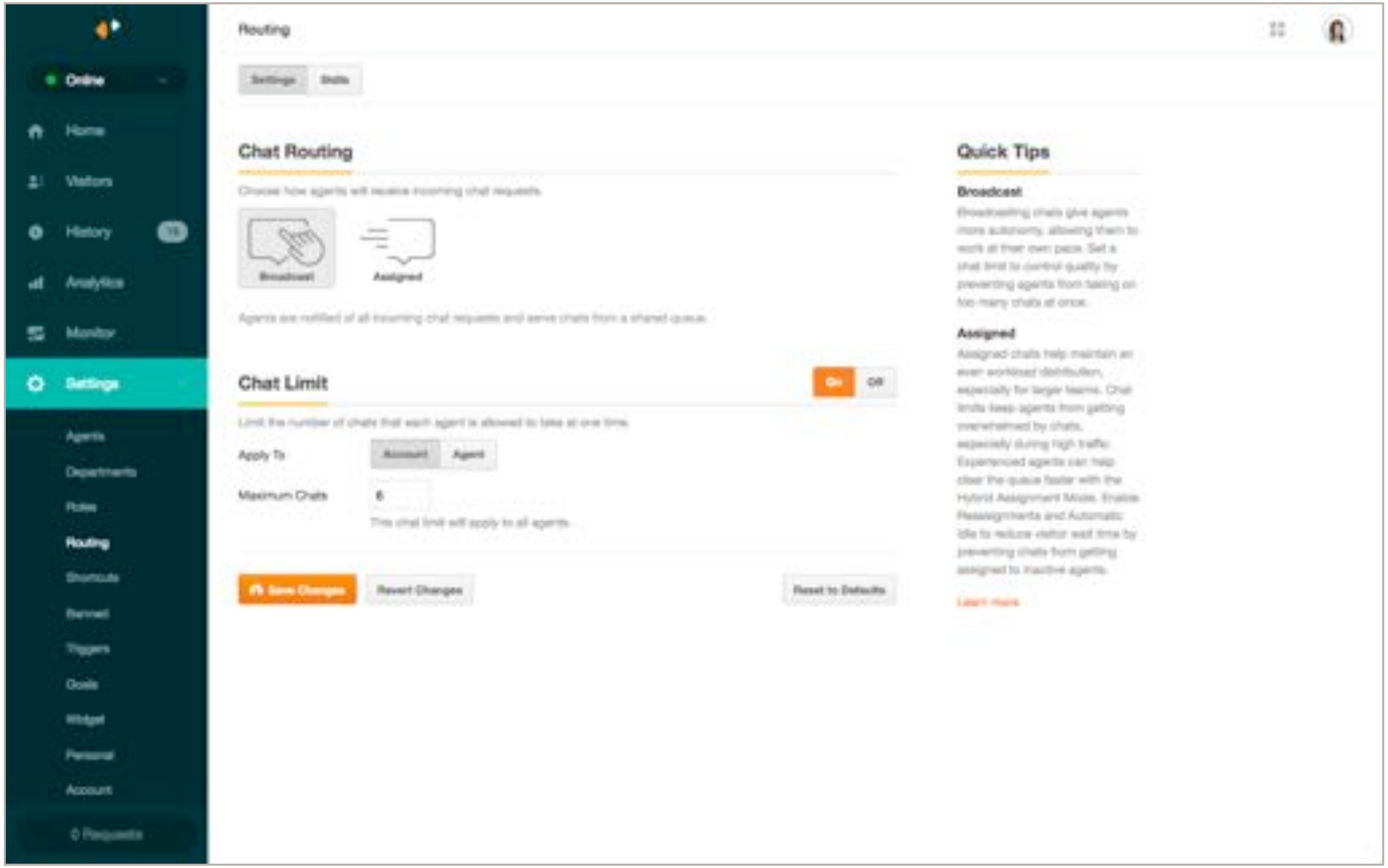


Route a Chat to an Agent Using Skills Routing

Use skills routing to **identify specific skills** an agent may have to pair visitors and agents accordingly.

Manage Incoming Chats

Routing chats



Demo

Set up skills routing

Manage Incoming Chats

Best practices for using triggers

Find the right agent

Get customer's requests in front of agents who are specialists in an area in the shortest amount of time. Use triggers to assign requests to smaller departments based on the pre-chat form.

Reach out

Proactively reach out to customers to welcome them to your site and ask how you can help. Users who take part in proactive chat are more satisfied.

Optimize Zendesk Chat

Utilize Shortcuts

Set Up a Trigger

Add Agents to a Department

Route a Chat to an Agent with Skills Routing

An Overview of Zendesk Chat

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Optimize Zendesk Chat

Measure Zendesk Chat

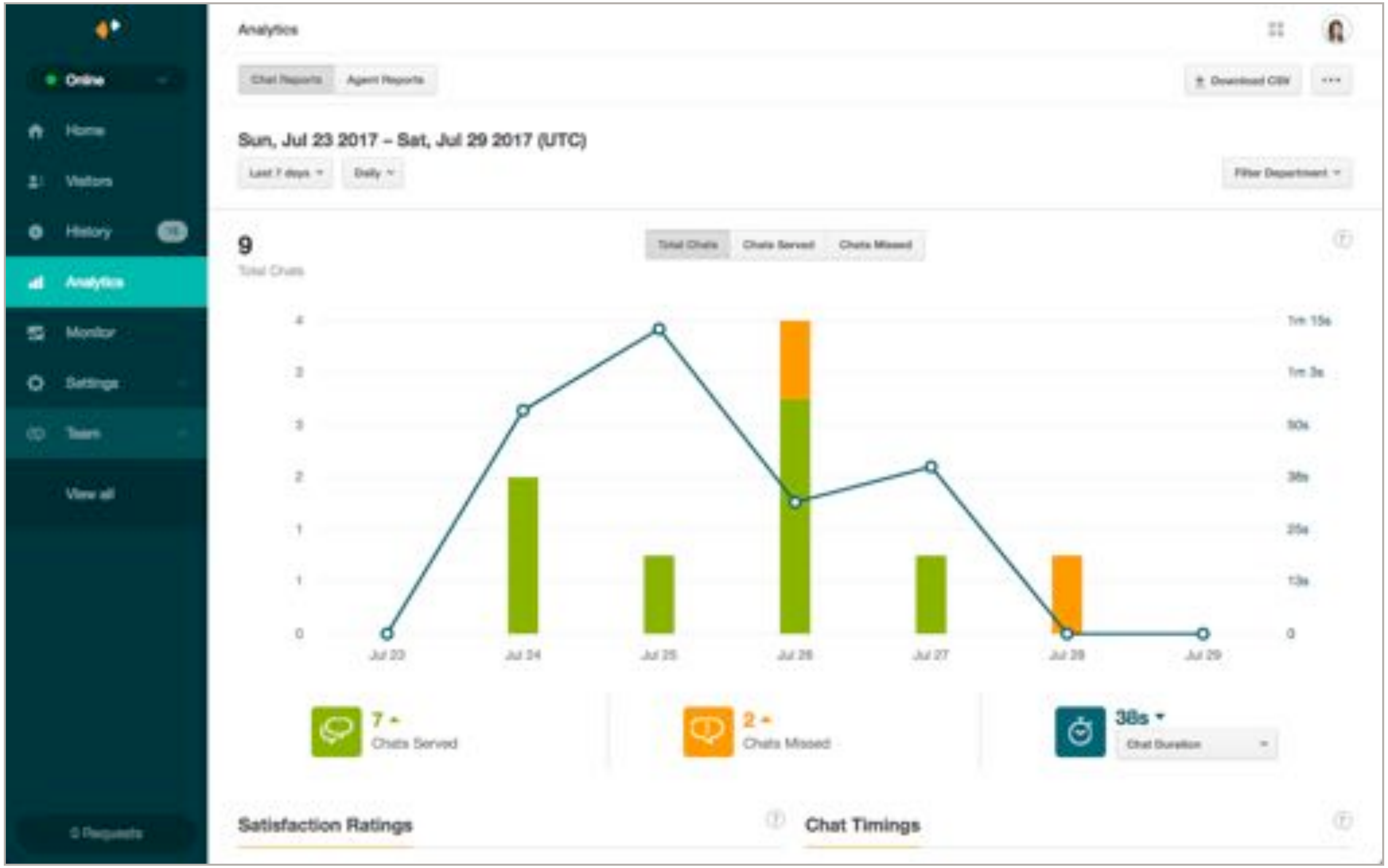
Measure Zendesk Chat

Explore Chat Analytics

Explore Chat Analytics

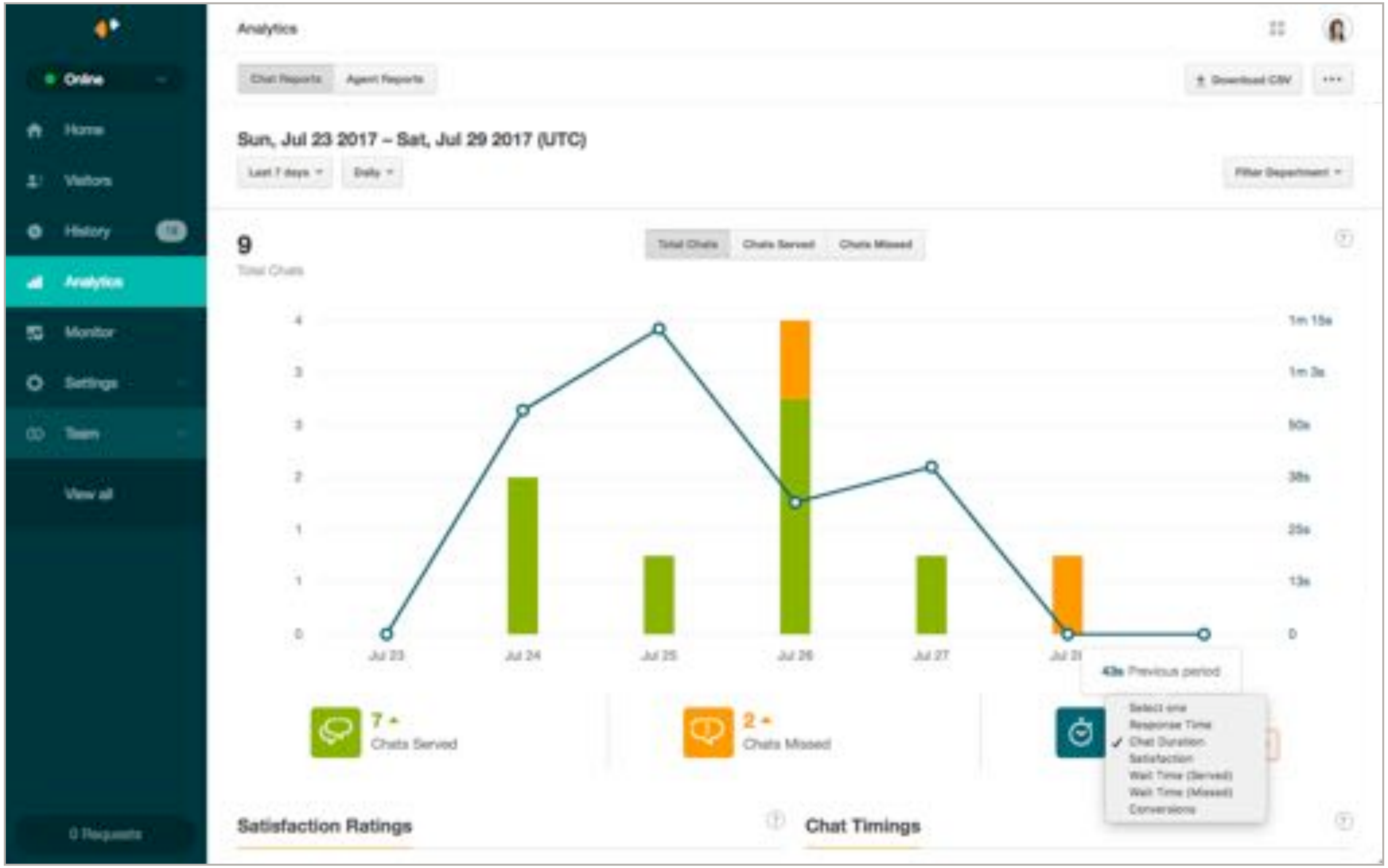
Explore Chat Analytics

Chat reports



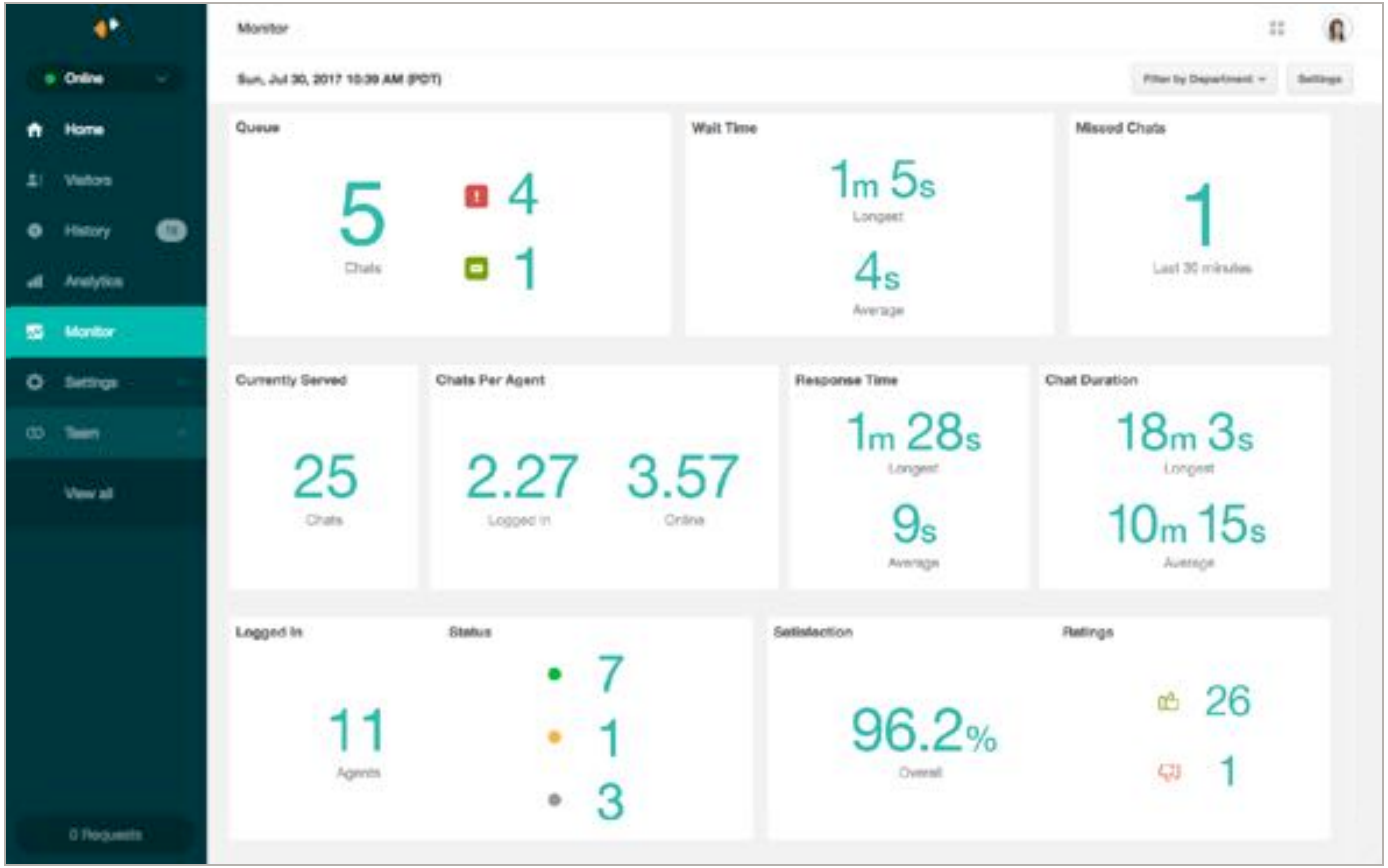
Explore Chat Analytics

Chat reports



Explore Chat Analytics

Real-time monitor



Demo

Access Chat analytics

Explore Chat Analytics

Try it!

Access Chat analytics

1. Navigate to **Analytics**.
2. Change the Chat Report from Last 7 Days to a Custom date range.
3. Enable the **Chat Duration** metric in blue.
4. Go to **Agent Reports**.
5. Navigate to **Agents Logged In**.
6. Set up a weekly and monthly email report for yourself.

Measure Zendesk Chat

Explore Chat Analytics

An Overview of Zendesk Chat

Set Up Zendesk Chat

Optimize Zendesk Chat

Measure Zendesk Chat

Post-Course Survey

zendesk